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ABSTRACT

Training is a major component in the development of an organization and in helping it to deal with social, organizational, and technological change. Planning training activities or developing an inservice education program involves several steps: establishing goals for training, planning a t. ining design with sequence and continuity, selecting and preparing for specific training activities, conducting the training program, and evaluating the effectiveness of the training program. Training methods available include: lecture and discussion, case method, role playing, laboratory method and various audiovisual methods. Evaluation is an important aspect of a training program and can also be helpful in the improvement of future programs. Suggestions for increasing the accuracy and usefulness of evaluation cover the choice of aspects of the program to be evaluated, process and methods used and methods of reporting evaluations. (Author/KP)

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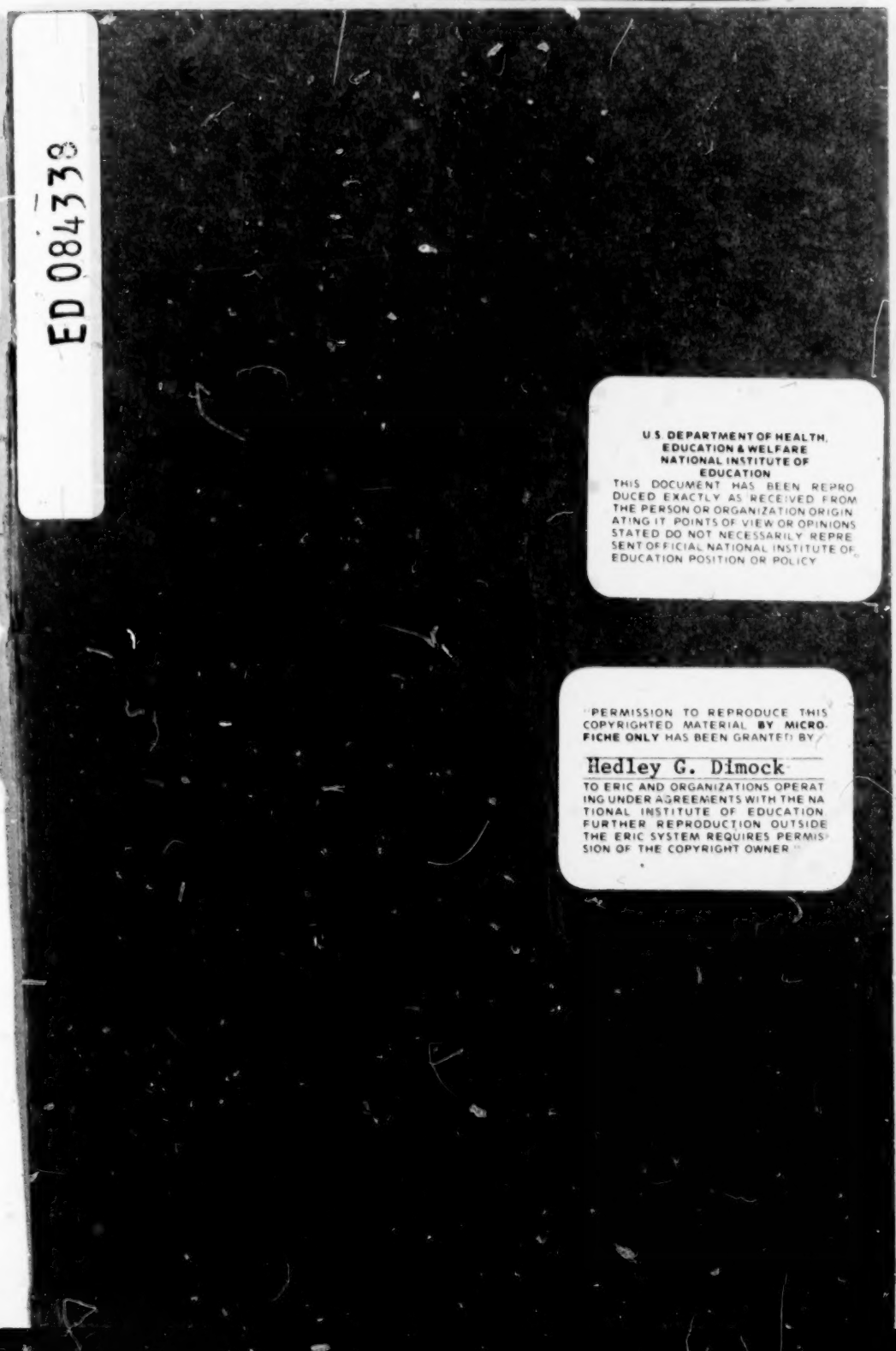

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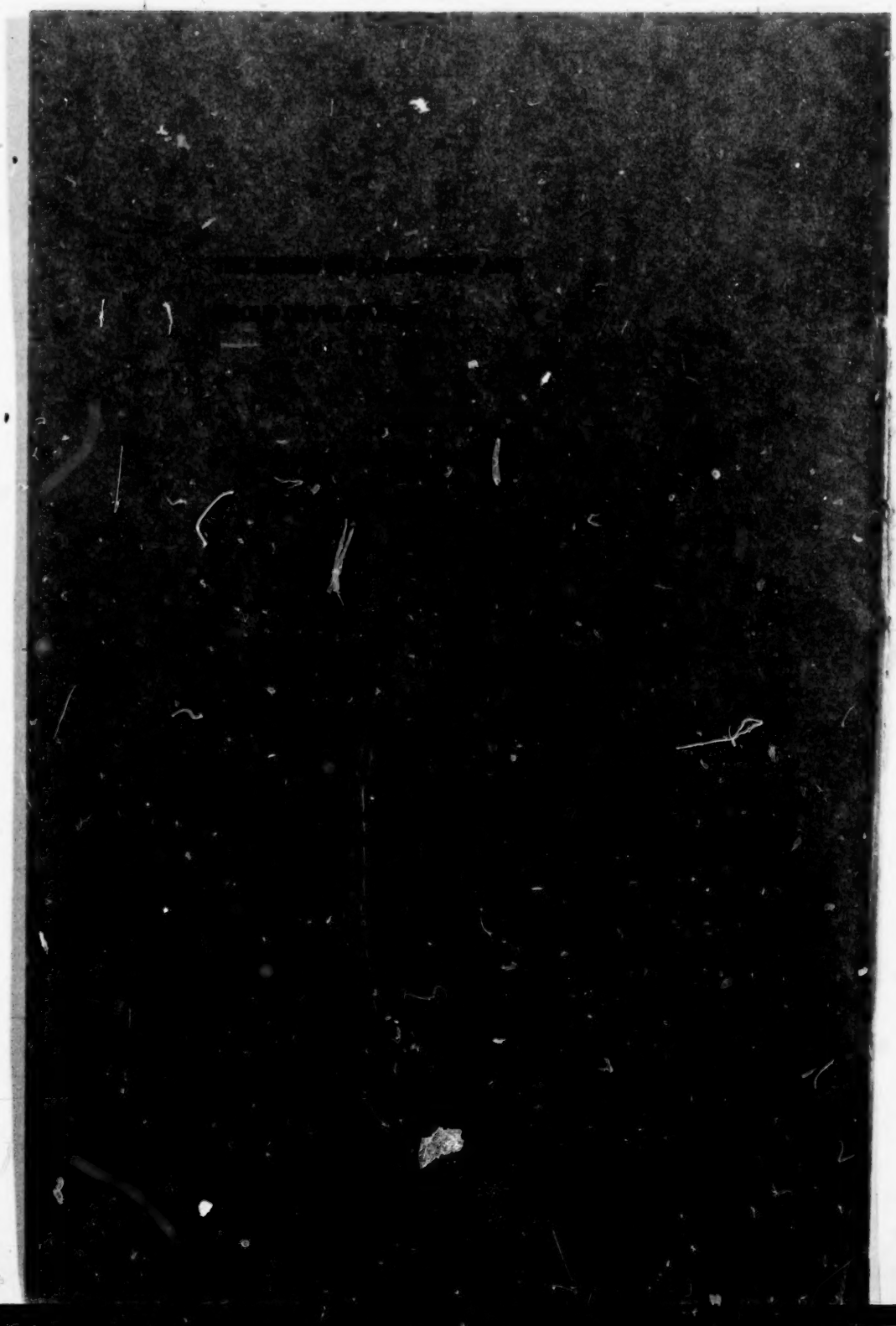

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PLANNING STAFF TRAINING PROGRAMS

by

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PART I
PLANNING STAFF TRAINING

Introduction

This monograph is written to help workers in the "people serving professions" plan staff training programs. These people will be responsible for staff training in schools, hospitals, summer camps, churches and social agencies. Examples will be used from my own experience consulting on training programs for staff nurses in hospitals, counselors in summer camps, high school teachers, social agency volunteer and staff leaders, librarians, community and overseas workers, church leaders, and interdisciplinary staff groups from single organizations. Special emphasis is placed on training people to work with other people rather than on teaching technical skills.

The overall goals of staff education are to help an organization run more efficiently and do a better job of serving its clients. Training is a major component in the development of an organization and helping it to deal with social, organizational and technological change. Providing staff with an opportunity to learn and grow usually raises morale, decreases turnover and absenteeism, and increases personal satisfaction in a job.

Planning training activities or developing an inservice education program involves several systematic steps. These are:

- Establishing goals for training.
- Planning a training design with sequence and continuity.
- Selecting and preparing for specific training activities.
- Conducting the training program.
- Evaluating the effectiveness of the training program.

As each of these areas is considered, an emphasis is placed on presenting a practical outline and opening up a range of possible methods for consideration – no one approach is suitable to all situations.

An Orientation to Training

During the past fifteen years I have evaluated about fifty different education and training programs using several different approaches to training including role playing, case method, T-group or lab training, project groups, on-the-job supervision, etc. I found the major factor that separated the successful from the less successful programs was the degree to which the learners participated in the program. By participation I mean the extent to which they were actively involved in making decisions about what they would do in the program and then were active in taking responsibility and carrying out activities related to their own learning. The training methods were not at all as important as a training design which encouraged the active participation of the learners.[1]

The first assumption about effective training that I want to put forth is:

> the training process is a cooperative process and all learners (participants and trainers) should participate in planning the program and be involved in the process of making other decisions which affect them.

I have put out this assumption in many different places and I have a feeling that it has sometimes been used to support a non-planning approach to training where it is hoped that educational experiences will just happen. Let me therefore emphasize that this assumption implies *collaborative planning* rather than unilateral planning which is usual in schools and many formal education courses. The whole contribution of a planned training design is to increase the efficiency of learning by providing organized and structured learnings in an effective sequence.

Other assumptions about effective training which have been useful in guiding my consultations on training and evaluating the quality of training designs are the following:

- Training must be related to the expressed needs and interests of the staff in their work.
- People learn by doing and practising what they have learned.
- Learning is enhanced by a supportive climate where a high trust level is developed and communication is open.

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[1] The research supporting this conclusion is described in the first monograph in this series – *Factors in Working with Groups*, Montreal: Sir George Williams University, 1970.

- Relationships and interactions among learners should be encouraged for a group of learners is a powerful motivating force and a major influence on attitudes and behavior.

- Each participant should be able to measure how well he is progressing and what he has learned. Training should include a frequent, systematic evaluation of progress toward goals.

It is interesting to note that while all of these assumptions are taught in teacher education programs, few of them show up in practice in the classroom. All of us may have a tendency to fall back on our own experiences as learners when we have the responsibility to develop a training experience for others. Certainly, I am no exception for after I completed my teacher training and was given responsibility for the training program of a summer camp, I planned a great program all by myself two months before camp started. And in my enthusiasm to plan something really useful for the staff I left the camp director out of participating in any part of the week long precamp program. The training designs and methods described here are, by and large, not ones which will have been experienced in traditional education and will, I expect, require a certain amount of risk in trying new things to implement them in practice.

The Planning Committee

The assumptions about training that have been discussed up to this point make it clear that the involvement of some or all of the participants in the planning process is very desirable. Probably the best way of starting this involvement is with the formation of a planning committee. In a program for a small group of people it may be possible for all of them to become the planning committee. However, a good working size for a planning committee is five to ten people and large groups of participants will need to form a planning committee representing the rest of the group. Those people not involved in the planning committee can still be involved indirectly by providing the committee with information on the training needs and in helping to establish the priorities for training. The planning committee should include the person responsible for training, the senior executive (agency administrator, principal, staff director, etc.), interested representatives of the senior and junior staff (oldtimers and newcomers), and perhaps an outside consultant or resource person.

In setting aside adequate time for planning, my experience has been that it takes about a day to plan for a day of training and another day to actually prepare for it. For a series of two hour programs once a month, it would take a somewhat higher ratio of planning time. Needless to say planning a training program is a rich educational experience and the benefits of a training program start with the planning committee.

Educators are often concerned that involving other people in planning training programs may result in lower quality programs than if they had done it themselves. This is quite a real risk in practice. However, the key to education and change is to get the staff to agree on goals and accept some responsibility for working on them. Ideas for improvement are a dime a dozen — we have always known more in any field than we have been able to implement in practice. A low quality program with good acceptance is a fair start in training. A high quality program without staff acceptance is a fade out. A planning committee and staff involvement in setting goals insures acceptance.

It has also been my experience that a staff group will come together on important training needs over a period of time. For example, a few years ago I was brought into a high school by the principal to work out an inservice program for the entire staff. I set up a planning committee along the lines described above and as they worked out their training needs and set up the first programs, the principal became agitated. The staff planned to work on timetable, extra-curricular responsibilities, and school rules for students but the principal wanted to work on curriculum and teaching methods. He felt these were more important to the welfare of the school and wanted me to put them into the program, but, of course, I supported the total planning committee. After the staff worked through some of the nitty-gritty problems that were troubling them (and thus tested the principal's readiness to deal with *their* concerns) they were anxious to move on to the curriculum and teaching methods areas.

Establishing Goals for Training

The major source of goals or objectives for a training program are the participants who the program will serve but, in some situations, they may be supplemented by goals originating from senior executive, textbooks or expert

resources, agency policy or the organizations clients. Occasionally, the staff may not be aware of policy changes in the organization or recent developments in the field which may effect their work. Hence, there may be some outside influence on the focus of the training which is quite appropriate to consider. Lacking these specific needs the basic question is how to poll the staff and assess their training needs.

Problem census

One of the most effective ways of collecting information on a staff's training needs is to gather them together and ask them to list the problems they would like to work on in a training program. Usually these suggestions come out as "How to do something or other." In this problem census all the members contribute their ideas and a composite list is drawn up including all the areas suggested. Then the group works on combining overlapping areas and grouping similar areas together. Finally, the reworked list is reacted to or perhaps voted on by the staff in order to establish priority needs. The areas receiving the greatest number of votes are put at the top of the list and this order sets the priorities for training.

Procedurally, a manageable group can be set up in several ways. If a group of twenty or so staff come to work on a problem census, they can be worked with as a total group. A larger group coming together at one time can be broken down into groups of ten with each group following the above procedure and then selecting a representative to report on their work. The representatives then gather together and repeat the same process, establishing training priorities that represent the whole group. Or, groups of ten to fifteen may be collected at different times in convenience to the staff and each group can submit its problem census and agreed on priorities. The planning committee is then responsible for putting all the reports together and integrating the requests for the first series of training programs.

Pencil and paper survey

A pencil and paper questionnaire is sent to each staff person and he is asked to describe his training needs as part of the total survey. The response to such questionnaires are summarized and if 2 or 3 areas come out as clear cut interests they would be decided on by the planning committee as the targets for the first series of training programs. If no one area stood out, the ten most frequently mentioned interests would be listed in another questionnaire. This would be sent back to all staff who would be asked to rank the ten areas in terms of interest to them. This procedure should clarify the major areas of interest.

Training Interest Survey Sample A

1. What are some of the problems you are now facing in your work that you would like to see developed in a training program?
2. What kind of training do you think would help you with these problems?
3. List any other general problems with the _____ (agency, hospital, camp, etc.) that you are aware of that you think staff should receive help with in a training program.

Training Interest Survey Sample B

1. What are some of the things you would like to understand better about your work?
2. What are some of the things in work relationships (attitudes, communication, cooperation, job assignment, supervision, etc.) that you would like to improve?
3. What are some of the skills that you would like to learn how to do better?

Training Interest Survey Sample C

1. Please list the areas that you think should be covered in a training program for the total staff.
2. Which area interests you the most and is therefore the topic you would like to see dealt with first?
3. Describe a problem which you are now facing which would be typical of the way this topic affects you.

Check list questionnaire

Following along the lines of a pencil and paper survey, an alternative is to list a wide variety of training interest and ask the staff to check off the areas that concern them. To help establish priorities they might also be asked to number 1, 2 and 3 their first three choices. Interests not included in the list can be added by each staff at the bottom. Such a check list should include a wide range of possible areas of training including needs for technical skills, new knowledge, and development of self-insight and sensitivity.

A check list survey is especially useful with a large group. It can also be given to the staff again, say after a series of several training programs, to evaluate progress made and ascertain new areas of great interest.

Interviews and group discussions

In situations where a new director of training is just starting or in an organization that has never had a training program before, it may be worthwhile to assess training needs through individual interviews. If the director of training were to carry out a series of interviews with a cross section of the staff he would get not only a great deal of understanding about training needs, but also establish some good contacts in the staff group. Both would reap rich dividends in future work.

The questions asked in the interviews could be similar to the A,B, and C sample Training Interest Surveys but the face to face situation permits more probing and follow-up of interesting, important or provocative areas. An interview situation might make it easier to assess the readiness of a staff group to participate in training. The following questions are suggestive of this line of approach.

Readiness for Training Survey Sample D

1. What percent of the staff here do you think are sincerely interested in participating in an inservice training program?
2. What are some of the reasons for readiness to participate?
3. What are some of the reasons for reluctance to participate?
4. What do you think would help set a good climate for training and reduce the reluctance to participate?

Group interviews, along very much the same lines as an individual interview, can be carried out by the person responsible for training with four to six people at a time. It helps if the groups are all in similar positions and more preferable if they all know each other. While the information gleaned may not be in quite as great a depth, it provides much broader coverage (one hundred people could be interviewed in small groups in a week) and helps to establish the all important personal contact.

Another procedure is to use some of the regular meetings that are held in the organization and ask that twenty or thirty minutes be devoted to discussing training interests. These group discussions might bring forth much of the information of the group interviews or group problem census but they would be carried out in usual groups using their own chairman or leadership resources. Each group would be

expected to submit a report on its discussion to the planning committee on staff training.

Planning a Training Design

Thinking of the planning committee on staff training now at work in planning a program to work towards the objectives established for worker improvement, there are a number of operational considerations to deal with, a training design to establish, activities to be selected, and finally a program to be conducted and evaluated.

Operational considerations

Although some of the operational considerations have already been described, there are several more that should be looked into before going much further. These are spelled out below.

1. **Who decides about training?**

Basic decisions about the possibilities for training in an organization are usually made at the policy or administrative level. They may be made by the board, the executive director, the policy and planning committee or the department heads. It is important to identify what group or groups have made policy decisions about training and what the decisions are. The planning committee on staff training can only function effectively if they know within what area they are free to make decisions. And if other policy questions come up during planning they will know the procedure for testing their suggestions.

In practice, it is best if these decisions can be shared as widely as possible with the staff. Our principle of good training practice (and good administrative procedure) is that those people affected by a decision should have a part in making that decision.

2. **Extent of training**

What will be the frequency, duration and length of a training program? Will the sessions be once a week, every two weeks, or once a month? How many of them will there be in one unit and how long will they last – one hour,

a half day or a day? What priority does training have in the organization setting, how much time will be devoted to it (and again who makes this decision)? The goals for training and the interests of the trainees should determine the amount of time that will be given to training, however, this is rarely the case. Usually, some guidelines will need to be laid down about the amount of time that can be devoted to training.

Along with the question of the amount of time to be devoted to training goes the accompanying decision about training going on during regular work hours, during off hours, or during part of both. Related to this is the question of what kind of training is best seen as orientation for the job, what should take place on the job and through regular supervision, what fits into the category of inservice training, and what areas are best left to off the job training which include professional meetings, conferences, workshops, etc. On the job training is clearly the responsibility of the organization while off the job training may be seen as a personal responsibility, or in some situations it is a shared responsibility. Obviously, over a period of time, some policy on staff development and training will have to be drawn up to take all of these factors into consideration.

3. **Cost of training**

Training can be a very costly activity especially when you include the salary of the director of training and the lost time salary equivalents of those participating in the training. There will also be costs for materials, resources, and any outside personnel used. Who will pay these costs? Will it be the organization through the operating budget? Will a separate staff development fund be established with contributions from outside? Or, will the trainees pay for it themselves? These decisions are usually outside of the sphere of those who are designing the training programs but it is important that a policy covering this be established and made known to the staff.

4. **Who will participate?**

This question is a two fold one involving both the variety of staff groupings attending a training program and the nature of participation, whether voluntary or expected. We think of most training programs as being of a voluntary nature but the situation may be such that the lack of participation by a few handicaps the learnings and possible implementation of learnings of those who do attend. The organization may also feel that if training programs are part of the procedures to keep the competency of staff up-to-date, and the organization operating efficiently at a peak, than all staff should be expected to attend.

Some training programs are of a very technical nature and would only interest one category of workers but other programs might be of interest to

many groups and, in fact, enhanced if more than one staff group attended. Careful consideration needs to be made of the basis of attendance as well as those who will be invited or free to attend if they desire. One type of training is designed for teams of staff workers and learnings are increased if the total team participates. Then, how will we select participants if more are interested than can be adequately handled? Should administrators and senior staff be expected to come, free to come if they wish, or asked not to come in view of their possibly inhibiting influence? Well, there are no easy answers to these questions. Our principles of learning make it quite clear that interests should surely be the most important criteria for attendance, and that the staff planning committee representing all staff is in the best position to make wise decisions around the other choices.

5. **Physical arrangements**

Will the training sessions be held in the organization, or will they be held outside such as in a school, university, conference centre, hotel, etc.? And, what kinds of physical arrangements will most facilitate the training process? While the organization is the usual location in view of cost and convenience, it is important to consider the use of outside facilities especially for half day or longer training sessions. The change of location is itself a motivating factor and it is helpful for staff to feel more free from their usual duties and to be able to relax in a less work oriented environment. The size of the staff group to be trained is another consideration here and it may be that the seating space in the room available for training may limit the number of possible participants. This would also be another reason to consider an outside location.

The Training Design

Once the priorities for training have been established and the basic organizational and operational considerations of training have been made, the planning committee on staff training is now ready to set up a design. In setting up a training design it is important to consider the following factors:

Sequence – Training activities should have either a logical or psychological sequence. A logical program might review organization goals and practices designed to meet these goals. It would then analyze

where practices break down, etc. A psychological sequence starts with the area of greatest concern to the staff and works from there.

Rhythm – The activities should have movement and flow that is fun and easy to follow. Rhythm and pace are closely related and it is important that a training program does not get bogged down in the same rut or level of concentration.

Variety – Different techniques and approaches should be used such as small groups and large groups, case studies, role playing, films, demonstrations, lectures, etc. A variety of activity contributes to a change of pace and helps keep a high interest level.

Continuity – There should be some carry over from one training activity or program to the next. This is especially important when sessions are held every two weeks or less frequently.

In setting up a training design it is important that the objectives for the program are clearly in the minds of all the planning committee. The training design and the activities selected should be carefully chosen to work toward these objectives and appear meaningful to all of the staff. Some bridging activities may need to be built in to help relate the training programs to on the job experience. Training design should be written up in a time sequence and checked for clarity with the planning committee. Its tentative form should have rough estimates of the time to be devoted to each activity in the training session. Playing it by ear rarely makes best use of the resources available. Flexibility at the option of the planning committee can be built into the design by on-the-spot changes in timing, or through planned alternates to specific training activities. For example, a planning committee could plan to have questions from the floor following a lecture presentation. If, however, questions were not forthcoming, an alternate plan might be to divide up into small buzz groups to discuss the presentation and then see if questions arise from the buzz groups. Considerable flexibility can be put into a carefully planned design by providing a number of these check-points for alternatives.

Following the completion of a training design, it is helpful to check it against the psychological principles of education and training which are listed earlier in this section, or check it against whatever other assumptions about learning the planning committee feel are important. The training design can also be tested against the types of training activities related to training goals listed on the following page.

Selecting Training Activities

On the following two pages are a list of types of training activities related to training goals and a list of possible learning activities for staff education programs. The first should be helpful in suggesting the training activities to consider depending on the specific nature of the training goal. The second list will be helpful for the planning committee to check over from time to time to make sure that they are considering the broadest possible range of activities in order to select the most appropriate ones. The following sections on role playing, case method and audio-visual methods suggest specific ways of using each method in a variety of situations, and will help to suggest meaningful alternatives to the tried and true lecture-discussion method.

It is well to use the experience of the planning committee in selecting training activities. They may be aware of certain activities that are likely to go over well with the group. For example, they may feel the staff would be fearful of getting involved in role playing, but would respond well to a case study. They may also feel that a panel discussion loses interest after thirty minutes as does a debate or the usual lecture. However, a well made film may hold attention for an hour and a laboratory exercise may require at least an hour for its completion. Such judgement would be extremely helpful in setting up activities that are timely and that fit appropriately into the time available. Other criteria that may be helpful in selecting training activities are:

Activities should be within the range of competence of the leaders or trainers. It is important to select activities that the staff feel comfortable in using.

Activities should be ones with which the staff can identify and that they feel are related to their training needs.

Activities should be related as much as possible to the actual situations of the staff. If non organization situations are used, bridging activities should be included to tie them into staff needs.

Activities should be stimulating and provide some emotional impact on the staff. This can be enhanced by providing opportunities for the staff to participate in the activity.

Activities should present opportunities for a number of learnings and provide several points for action suggestions, and job implications to be made.

If possible, it should provide an opportunity for the staff to have guided practice in the specific skills that are required to carry out the new learning.

The training activity should be educationally sound (test it against my psychological assumptions of education and training).

Possible Learning Activities for Staff Education Programs

1. **General Sessions**

   (a) One way presentations

   - talks, experience or research reports, book reviews
   - group interviews
   - panels, symposiums, debates
   - films, video tape
   - demonstrations, skits, role playing

   (b) Audience Participation

   - listening teams or watching groups
   - reaction panels
   - audience role playing
   - buzz sessions
   - question periods
   - group reports
   - open discussion
   - skill exercises
   - case problem discussion
   - consultation groups (2's, 3's, or 4's)

2. **Work Groups**

   (a) Laboratory groups or T-groups
   (b) Special interest groups
   (c) Problem solving groups
   (d) Discussion groups (developmental, free, risk technique)
   (e) Planning groups
   (f) Task groups
   (g) Research and evaluation groups
   (h) Skill training groups
   (i) Consultation groups
   (j) Study groups (case studies, members' experiences)

3. **Prepared Readings** (staff manual, resource books, etc.)

4. **Field trip** (observing other organizations, visiting clients in other settings, watching other leaders at work)

5. **Practice periods** (technical skills, first aid procedures, etc.)

Types of Training Activities Related to Training Goals

Training Goal	Related Training Activities
Knowledge and understanding (Facts and information based on experience and research; generalizations or theory to facilitate application of learning.)	Lectures, panels, reports. Reading and discussion of reading. Films, video tape recording Group discussions, theory building exercises, and application tests.
Sensitivity (Awareness of and empathy with other people's feelings, perceptions and attitudes.)	Case Studies. T-groups. Role playing and role reversal Group discussions. Laboratory methods.
Self-Insight (Increasing self-awareness, understanding of own behavior, and assessment of personal strengths and weaknesses.)	Personal feedback such as in sensitivity training (T-groups), video or sound recordings. Role playing and psychodrama. Psychological tests, personal counseling.
Attitudes (Modifying biases and prejudices, freeing one's potential by reducing fears and other personal blocks.)	Philosophical and personal discussions. T-groups or laboratory methods. Case method. Role playing and role reversal. Field experiences and intergroup activities. Films.
Skills (Learning new ways of behaving and implementing understandings; technical skills related to job developed through practice.)	Skill training exercises. Practice experiences. Role playing. Demonstrations. Drill. Supervised practice.

Conducting the Training Program

Most of the operational considerations important in conducting the training program have already been mentioned, but let us quickly add the following.

Plans for leadership and direction of the session. Who is going to take which roles such as master of ceremonies, discussion leader or recorder in small groups and what kind of briefing or special preparation do they require?

Preparation of training equipment – chalkboard, newsprint, film projector, tape recorder, etc.

Physical arrangements for the meeting, including adequate seating, arrangement of the seating to facilitate the training activity, arrangements for smoking and coffee, check lighting, ventilation, electrical outlets, and possible sources of distraction. Are special seating arrangements needed for possible late arrivals or early departures?

Availability of resource materials for follow-up study (it is not helpful to suggest books or other resource materials if they are not readily available to the staff).

Evaluation and Replanning

Before the training design becomes too definite, it is well to give some attention to the subject of assessment and evaluation which will guide the direction of the future training sessions. Training designs that provide a great deal of flexibility will want to get fairly frequent feedback from the trainees to help provide a realistic basis for changing the design and setting up alternate activities. With such a design it would be best to have an evaluation following each training session. If on the other hand the design is fairly rigid and it is not planned to make many changes in it, frequent feedback from the participants is not as necessary.

In any case, as the design approaches the end of the sequence presently planned, it is well to collect the information that will be helpful in planning further training experiences. It is important to know the reactions of the trainees to the training experience and what progress towards training objectives has already taken

place. Collecting this information will be repeating the process of surveying the staff and assessing their interests and needs.

The planning committee will want to consider how it can best evaluate the extent to which the training is achieving its objectives. They will need to spell out what information is needed before, during and after the program. Plans for reporting the results of this evaluation to the staff should be made. Then, responsibility for carrying out the evaluation should be allocated and the committee can consider how it will use the information in planning further training experiences. All of these questions are dealt with more fully in the final section on evaluating training programs.

PART II
TRAINING METHODS

Lecture and Discussion Methods

All of us are quite familiar with the traditional lecture method. Other methods that have been found useful in conveying information are panel discussions, symposiums, reports and debates. A panel discussion usually has three to five discussants often with a moderator or chairman to coordinate and regulate the discussion. Specific topics or questions are raised and the panelists respond on an extemporaneous basis, responding to each other and the questions of the moderator. A symposium is a series of prepared speeches by different people around some common theme. It presents the information more systematically than a panel but lacks the open discussion and spontaneity of the panel. Similar to a symposium is the experience report method where different people tell how they handled a particular problem or situation.

Lectures and associated method have little effect on attitudes and behavior and run the risk of loosing the attention of the participants. However, when lectures are combined with group discussions and decisions about action, their impact is greatly enhanced. My own rule of thumb is to combine a not more than thirty minute lecture or panel with some audience involving technique. Watching groups or small groups for discussion are my preferences over general discussions or question periods.

Watching groups are formed before the lecture, film or other one way presentation starts. Four to eight people are assigned to each group with a task of watching for a specific thing during the presentation. In a large audience more than one group may be given the same topic. Sample assignments from a lecture on leadership could include:

- work out examples from your own experiences that support points made in the lecture.
- work out examples from your own experiences that disagree with points made in the lecture.
- identify parts of the lecture that you think would be worth trying out in your work.
- list the areas that are not clear in the lecture or that you think should have further elaboration.

Following the lecture, the watching groups get together for five to fifteen minutes to work out their assignments and prepare to report back to the total group. Each group report usually takes five to ten minutes.

Discussion groups are usually formed following the presentation and likely have from six to ten participants. They may be free to discuss any area of their choosing or may be assigned a topic. A chairman is usually helpful to facilitate the discussion and a recorder can make notes on the discussion to report to the total group later. I usually ask each group to select their own chairman and recorder and encourage them not to take too long in doing this, reminding them of the time limit for their discussion. Other people use an arbitrary assignment procedure effectively – "the person in each group closest to the door will be the chairman and the person on their right, the recorder".

Discussion groups may work for five minutes or perhaps as long as an hour or two. While I have found the time in the group to be used quite well, I have encountered frustration with long reports from six or more discussion groups. In facilitating these report back sessions, I try to limit all reporting to fifteen or twenty minutes. If it looks like it might run longer I consider such condensing techniques as having only a few of the groups report (picked on a random basis), asking the recorders to report their two or three major points or to report on areas not already mentioned. Five or six of the recorders might be asked to form a panel and *discuss* some of their ideas and in longer sessions the recorders reports can be duplicated and distributed to everyone.[1]

The *work group method* is rather similar to a long discussion group. Again, six to ten or perhaps twelve people compose a group which has a chairman and recorder. In response to some general input – a lecture, film, case study, etc. – the work groups are given a specific assignment and may work on it for an hour to several hours. Usually, there is some kind of report or presentation to the total group but these may take many forms. For example, after a lecture on interpersonal communication, four work groups were given six hours to prepare a demonstration or exercise, illustrating one or more points from the lecture. Each demonstration with the other three work groups could last up to an hour. The total program with introduction and evaluation ran for twelve hours – in this case divided into two sessions of six hours.[2]

Visual aids usually increase the interest and attention given to a lecture. These

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[1] Rapid speed photocopying machines make this possible or having recorders write on stencils of the older spirit copying machines which can then be inserted and a hundred copies will be printed in a minute.

[2] For more information on developmental and free discussions including the use of the risk technique see: Moier, Norman R.F. *Principles of Human Relations*. New York: Wiley, 1952

may include notes or diagrams on a blackboard, prepared material on newsprint or overhead projector, or papers passed out to all participants. In giving a lecture to large groups, especially when I suspect attention may wander I try to work out some way in which people can be involved. This may take the form of watching groups, or I may work out an exercise with them to illustrate a point, or prepare a quick quiz questionnaire which I ask them to complete sometime during the lecture to alert them to the points I was trying to get across.

The Case Method

The case method has been a favorite for many years in teaching law, business administration and human relations. In more recent years it has been widely used in nursing, camping, and training teachers and group leaders. There are now good source books of cases in these fields.[1] In general, there are three types of cases used in the case method: the case study; the case problem; and the case incident.

The Case Study

A case study usually attempts to describe the life history of an individual or group and all the factors affecting the situation. It is the longest and most formal of the three. It tries to give some depth to a picture of the individual or situation and a sufficient amount of information about the case to enable decisions about it to be made. A complete case study does not leave the reader with a number of questions about it. A case study of a group, for example, would give a well rounded description of that group on several different dimensions. It would give a history of the group, some information about the background personality and behavior of its individual members, a description of their work positions, and some picture of the goals or task of the group. A case study of a client would describe his home, job and social activities as well as details about his personal life.

The Case Problem

A case problem focuses on one central situation which usually requires some decision or solution. It may be an excerpt of a case study or simply a description of

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[1] For case in "Human aspects of Administration", see our series with that title by Hem Jain. Montreal: Centre for Human Relations and Community Studies, Sir George Williams University, 1973.

immediate factors affecting a problem situation. Usually a case problem is set up in a way that asks the person to work out its solution. The decision the case problem asks for may deal with individual behavior, staff relations, technical procedures, group problem solving procedures and so forth. For example, the case problem might state: You are alone on the male medical ward with twenty-three patients at three o'clock in the morning when the fire alarm rings. Describe what you would do.

The Case Incident

The case incident describes very briefly a critical or crucial situation. It does not present any background information but just pinpoints an incident requiring some decision. The decisions about an incident come from the background and experiences of the reader rather than through an interpretation of the background information such as a case study presents. This makes a case incident a type of projective technique. A case incident may be used in such a way that part of the procedure is to gather the background information on it or to describe what background information would be needed in order to make a logical decision regarding it. The objective here is to develop a systematic way of thinking about problem situations. For example, picture yourself as the teacher in an eighth grade class of thirty students where a girl who has been sitting quietly all morning suddenly jumps up and throws her lunch across the room at another student, bringing the whole class to a standstill. What more information would you want in order to handle this situation?

Procedural Techniques in Using the Case Method

The most usual way of using the case method has been to ask the participants what they would do in the described situation and then discuss their answers. The participants analysis and interpretation of the case are often written first and then discussed verbally.

Let us now describe some of the other techniques that can be used in conjunction with the case method to make it more effective:

1. Guides can be used as an aid to the analysis and interpretation of cases. A written guide encourages a more thorough and systematic job of analyzing a case. If a case involves interpersonal relations between two people, the following questions could be used as a guide.

Case Study Guide

(a) What is the major problem?
(b) What are the obvious factors contributing to this problem?
(c) What other possible explanations are there for this problem?
(d) What other information would be helpful in understanding the problem?
(e) Is the problem described in the case study the real problem or is it just a

symptom? If it is not the real problem, what is?

(f) How does the person involved explain the problem; feel about the problem; see himself in relationship to those involved?

(g) How accurate a picture does the person involved have of the problem situation?

(h) What approaches can be used to work constructively on this problem?

(i) What are the major principles of human relations that have guided you in selecting a solution for this case problem?

2. At the time when the participants suggest their solution to the problem or situation it is often helpful if they can *show* what they would do rather than just describe it. For example, if a counselor says that he would try to reason with a camper who refuses to eat his lunch, he would be asked to pretend he was in the situation and show what he would actually do. Another counselor would pretend to be the camper in question. This is called role playing.

3. If the staff education group is rather large, small group discussions may be helpful stimulants to thinking along a number of different lines. The small groups can be used effectively in helping to bring together many different opinions and interpretations. Small groups because of their size encourage everyone to share ideas and increases the participation in the staff education program. In a relatively short time everyone in the group can discuss their interpretation, if small groups, such as described in the previous section, are used.

4. Cases may be selected that help to illustrate differing opinions about basic principles or procedures. To help bring out the thinking behind these principles debates can be staged with the participants replying to the questions raised by the members of the other side. This procedure gets all the feelings into the open where they may be examined. It must be watched closely, however, to see that it does not turn into a straight argument and that opinions don't become rigid just out of commitment to a side.

5. Very often case problems and incidents can be presented through simulated live media rather than the usual written records. If a case involves a situation in which people are talking, it can be put on sound or video tape. Staff act the part of the people involved while the case study is being recorded. Or, if the case study involves some action, it may be presented very effectively through a little skit or demonstration. Again participants act the parts of the people involved in the case. Such presentations give cases a greater flavour of reality. The suggestion of real-life action may make it easier for those watching to empathize or identify with the characters in the case.

6. An exciting innovation in the case method is to have staff prepare a case study based on their own experience rather than use a case from published sources. A good way of handling a home grown case study is to develop it to the point where something needs to be done and then ask the participants to figure out how they would handle it. Later, after they have presented their solutions the person who was in the case can report how he solved the problem. This encourages a problem solving approach and allows for a full discussion of why the person involved in the case did what he did.

An Example of the Case Incident Process

The following example represents one use of the case incident. The incident process follows five steps. First, each member of the group studies the incident which is no more than a paragraph in length. He asks himself what seems to be going on, and what does he need to find out in order to get at the basic issues. In the fact finding phase, which comes second, these questions are put into words. The answers are given by the discussion leader who has read all the material available pertaining to the incident. In the third phase the members work on the decisive questions – what is the immediate issue and how can it be stated most effectively? In the fourth stage each member writes his decision on the issue backing it up with his reasons. A count can be taken to show what the group as a whole feels should be the answer. A group discussion or debate about an appropriate solution may now follow. The decisions and reasons are then tested by what actually happened in the case, which was not necessarily the correct answer but it gives the members some frame of reference for considering their own answers. In the fifth stage generalizations are made from the case and these are then converted into workable principles.

This example of the incident process was condensed from a tape recording of a one hour class. It is a class of twenty-five student nurses (on pediatric affiliation) studying the psychology of the hospitalized child.

Teacher: Yesterday, we described and discussed the factors affecting the behavior and personality of children in the hospital. Now we are going to look at the case of a child who was here several months ago. We will develop the factors affecting his behavior as described in the following incident. I am going to describe a problem situation that occurred for a student nurse. You are going to imagine yourselves as this student and decide what you would have done in this situation. Ask all the questions you want until you have all the information you think necessary to make the most effective decision.

The scene takes place on Ward D at 4:30 p.m. on a Thursday afternoon. Miss Watkins, a student nurse, is passing out the supper trays. After passing out several trays she brings one up to Alan Redino. "Here's your supper Alan."

(Teacher, pretending he is Miss Watkins, is acting out the situation). (Teacher now pretending he is Alan). "I don't want it." (Miss Watkins). "Why don't you want your supper? " (Alan) "I am not going to eat my supper. You breathed on it and I am not going to eat it." (Miss Watkins) "I breathed on it . . . but Alan I didn't . . ." (Alan interrupting) "I saw you breathe on it and I'm not going to eat it."

Teacher: In a few minutes you are all going to be asked what you would have done in this situation. Before you decide, what would you like to know about Alan and the factors involved in this situation in order to make the most effective and intelligent decision. (Teacher moves to board to list questions).

Student 3: How old was he?

Teacher: Alan had just had his tenth birthday. (Lists AGE on the board)

Student 19: What was wrong with him?

Teacher: He was a diabetic, had a lapse and was in for treatment (Lists DIAGNOSIS on the board.)

Student 8: Did his parents come to visit him very often?

Teacher: No, he came from a broken home and neither his mother nor father had visited him for some time. His uncle, however, frequently dropped in to see him. (Lists VISITORS on the board).

The students continue to ask questions for twenty minutes. When they have finished, the list on the board includes: home situation; length of stay in hospital; previous admissions; special diet; unusual occurrances during the day (anything about germs and breathing); relation of nurse to Alan; previous situations of this type; Alan's relations with other children: relations with other nurses; I.Q.; and so forth.

Teacher: Find a sheet of paper now and write very briefly what you would have done in this situation. Then state briefly why you think this would have been the most effective thing to do. (Nurses take five minutes writing out their decisions and reasons for them.)

Teacher: It looks like everyone has finished now. Let's just start around the circle and see what your different answers and reasons are. (Moves to board where he lists opinions.)

Student 1: I would have left Alan and gone about serving the rest of the trays. I think Alan just wanted attention and if I had given in to him he would have continued to do these things to get it.

Student 2: I don't think Alan was serious about the breathing and I would have made a sort of joke about the whole thing.

Teacher: Well, pretend you are there and tell us and show us what you would do.

Student 2: (Acts out situation holding tray at arms length with other hand over her mouth and nose. She sets tray down and with her hand brushes away imaginary bacteria). That should fix those old bacteria. If it doesn't I'll really beat them up. (Double up fists and pretends she is punching something).

Other solutions follow from the rest of the students. Two other students with unusual solutions are asked to show (role playing) what they would have done. (This phase takes about twenty minutes).

Teacher and class now classify the factors about which the questions were asked. These they find fit into the categories they described in the previous session as the factors affecting the behavior of children in the hospital. The factors thought to have a possible effect on Alan's behavior were then checked to show whether this information could have been secured from the records, from observations, or from talking with Alan. The process of systematic thinking about this incident was reviewed for the class.

Teacher: (Going back now to the incident.) It is interesting and perhaps helpful, to note what Miss Watkins did in this situation. Remember that she was forced to make her decision immediately and couldn't think about it in the detached atmosphere of the classroom like we did. Consequently, she did what many of us would have done in that situation. She was quite upset about Alan's refusal to eat supper. After vigorously denying that she had breathed on the food, she turned around and left. Alan didn't eat the supper and after a while she took it back to the kitchen. Unbeknown to Miss Watkins, Alan later went to the kitchen and ate his supper. (The students asked how he got along with her in the future and how Alan's life story ended.) This ended the hour session.

Role Playing

In its simplest form role playing is the acting out of situation or problem. It is a way of practising or living through a situation which is imagined to be real. Instead

of talking about a situation and how you would handle it, you pretend that you are actually involved in the situation and show what you would do. For example, Jane, a Sunday School teacher, said she had a lot of trouble getting her class started. The children wouldn't quiet down and it took some time to get them started on their lesson. She asked the other teachers if they had any suggestions about getting started. The other teachers started giving suggestions when the superintendent asked the teachers to show what they would do and the others would pretend they were Jane's unruly class. Several teachers took turns demonstrating their solid starting approaches and Jane said they were really helpful to see. This was role playing.

The major purpose of role playing is to make problem solving more real. People are put into a situation and interact as if they were in real situation. Once people get involved in the role playing they may react with very real emotions and get quite caught up in the experience. In this sense it is real and consequently has been referred to as reality practice.

Role playing can take the form of a skit or demonstration where the participants plan ahead of time what they are going to do. For example, in a camp training program when the topic of discipline was coming up, the director asked five staff to put on a demonstration of a discipline situation. The five staff worked out a scene in which two campers were fighting in the presence of two more campers and the counselor felt he had to intervene and break it up. They put on this demonstration, which they had rehearsed several times, for the entire camp staff and a lively discussion followed with several staff showing how they would have handled the fight. Other forms of role playing can be unrehearsed such as a person who is presented with a problem situation and just makes up what he would say or do as he goes along. Or, it can be an opportunity to practice technical skills such as first aid treatment or mouth to mouth resuscitation. The following examples of role playing show how the technique can be used in typical situations for staff training.

Example A

A group of eight new volunteer club leaders were being prepared to work with boys' and girls' club. The staff supervisor was trying to give the group some idea of their responsibility in the clubs and how these responsibilities might be carried out most effectively. The supervisor outlined the usual procedures for a nomination and election of officers and the role that these officers performed in the club meetings. When he had finished he asked if there were any questions. One of the volunteers said, "Yes, I understand what you say, but I don't know how it actually works out in practice. At least I don't feel I know how to do it. Supposing they don't have any ideas as to who might take on the different offices." The supervisor pointed out that there were many ways in which officers could be nominated and elected and that their use depended a great deal on the advisor and on the club members. He pointed out that what might work in one group might not work at all in

another. The supervisor suggested, however, that if some different ways of handling nominations and elections were shown, everyone might get some idea and begin to see what might work out well and what method they would like to try with their group. He suggested that seven of the volunteers pretend they were members of the club and that the eighth volunteer actually go through the procedure of nomination and election of officers with the group. He suggested that they take turns doing this so that each advisor would have an opportunity to practice the techniques of nomination and election of officers. During the first three sequences, the group members were well behaved and the elections went off very smoothly. For each of the next five scenes he briefed the members on some typical roles to play that would be most usual of the children that they would likely encounter in their groups. One group did not have any names to suggest for the office of secretary. Another group suggested everybody for all of the offices. Another group split three and three in voting with one member abstaining. Each of the scene lasted about four minutes and during this part of the training program each of the volunteer advisors had an opportunity to actually try out a specific procedure for nominating and electing officers. After the last volunteer had taken his turn as advisor in the make believe group they talked about the different methods that had been used, which ones had worked out well, and which ones could be improved on. Those who had been acting as members told how they had felt when different methods had been used and what they thought would have worked in their particular case.

Example B

During their third week of pediatric affiliation in a children's hospital a group of student nurses were discussing their experiences and problems encountered to date. One of the problem areas most frequently brought out by the students was around the feeding of children. Some children were just not hungry, others very selective of the food that they ate, some wanted to eat their desert before their main course, and others very resistant towards the nurse for trying to get them to eat. Following a general discussion of some of these problems a student nurse asked: "Well, just how do you get kids to eat their meals?" "What do you do if they don't want to eat?" The clinical instructor pointed out that there were a variety of ways in which these problems might be met and that a great deal of the success of the different approaches was dependent upon the person for whom they were used. She pointed out, however, that if some of the different ways of handling the feeding problem were shown, everyone might get some ideas and begin to enlarge their repertoire in meeting this kind of a situation. She suggested that some of the nurses who had encountered feeding problems with children might take the part of the children and demonstrate the problem. Then other nurses could take turns trying out their method of handling that problem. In the role playing situations which followed, five nurses took on the part of various children and the problems they created around meal times. Two or three nurses demonstrated how they would attempt to handle the problems with each of these "children". Each scene lasted just a few minutes.

After each set of scenes was completed, the nurses who had played the children were asked to comment on how they felt when the different nurses had moved in to deal with their feeding concerns. They expressed a variety of reactions to the attempts and were especially resentful of those nurses who put pressure on them by attempting to wield a big stick, who threatened them, or who implied that they would get sicker if they did not eat. They remarked that they liked being talked to as responsible persons and felt that the best approach was one of interest and concern with a readiness to respect the decision of the child. These comments helped everyone evaluate the probable outcome and success of the different methods that had been demonstrated.

At a later session of the nurses pediatric training program the group was discussing how discipline problems should be handled. The clinical instructor broke into the discussion and said that she thought a demonstration might help to make the discussion more clear and concrete. She asked for six people to be in a role playing situation. Each of the six was given a brief description of the role that she was to take in the situation. One participant was asked to be the nurse and she was instructed to act just as she thought she would in a similar situation if it were real. The other five were instructed to be patients and were asked to create a disturbance at bedtime. One was to pretend she was a silly patient and laugh and giggle at all of the happenings. Another was instructed to be a smart aleck and talk back to the nurse. A third was directed to refuse to get into bed and to think of all possible reasons why she shouldn't. The other two were instructed to act just as they felt they would if they were in a real situation like this one.

While the role players were looking over their parts and getting ready to take them on, the clinical instructor set the scene for the role playing by saying this was Ward D, a medical ward in the hospital, and that it was now nine thirty and well past the time for lights out and quietness on the ward. She said that the children were involved in a lot of horseplay, were being very silly with one another, and were resisting efforts to get them into bed. She then started the role playing and the nurse moved in to quiet the children down and get them into bed. She physically separated the children, turned out the lights on the ward, and then sat on the bed of the most rambunctious child talking to him and trying to settle him down. At this point the role playing was stopped.

There was a brief discussion of the whole situation. The participants were asked to discuss how they felt in the situation and then the audience made observations on the important points they noticed. Then the clinical instructor asked the group to divide up into small groups of six. Each group was instructed to replay the situation that they had seen and to take turns being the nurse. This part took another half hour. Then the clinical instructor said that each group would have ten minutes to talk over the different ways they had handled the situation and asked that one person in each group keep track of the discussion so that she could report it back to the rest of the groups. At the end of the ten minutes each group

reported. They gave some idea of what had happened in the role playing and what the group had seen as implications for handling discipline problems on the wards. The instructor made a compilation of these and returned a complete list in printed form to the participants at a later session.

Example C

During a monthly meeting of group advisors in a YMCA, the question was raised of how to help groups make decisions in a democratic fashion. The advisors pointed out that they were committed to the principle of democratic leadership and letting the members make the decisions but they had trouble implementing it with their groups. The members wanted action, not to sit around and decide things and time was short. Role playing was introduced at this point into the advisors' training to help them understand decision making procedures and to develop the skills to enable them to use it effectively with their groups. The group of twelve advisors was divided into two groups of six each. Each group was given a similar problem to work on – namely, the selection of a service project for the group. One advisor was appointed as the president or chairman of the group of six and his job was to help the group reach a decision with as many of the members agreeing to it as possible. Each member in the group was briefed privately as to what service project he favoured the total group working on. This made certain that there were different opinions in the group and that the situation would be as real as possible.

Both groups used this problem of the service project and another one about a dance that the supervisor had prepared. Towards the end of the training session one group worked on an additional decision making problem while the other group acted as observers. They were watching to see whether the problem was clear to everyone, how the participants reacted to each other, what solutions were suggested and discussed, who was blocking, seeking recognition, supporting, encouraging, facilitating, etc. The observers were able to see a number of things that the role players did not and they added a great deal to the analysis of the problem at the end of the problem solving scene.

Example D

The boys in cabin F in the older boys' section thought their counselor was picking on them when he tried to get them to clean up the cabin. One morning as the campers were resisting the clean-up, Bill, the counselor, asked Joe, the ring leader, to pretend that he was the counselor while he would pretend he was a camper. Joe thought this was a grand idea. Bill then gave him the problem of working out cabin clean-up in such a way that he was satisfied with it. Joe started right in, and ordered all the fellows to clean up the cabin. Bill resisted in the same way that Joe had, and the other campers took their cue from him. Joe threatened him and shouted that he was the counselor. When the campers still refused to obey him, he stopped role playing and then said that the cabin would just have to stay dirty. Everyone laughed and then started cleaning up the cabin. The next morning

when the cabin wasn't cleaned up, Bill playfully asked who wanted to be counselor today. Everyone including Joe laughed. Soon they started cleaning up the cabin. The problem did not come up again.

Two chief difficulties in role playing are starting off and getting the actors to relax and be themselves. It may be difficult to find sufficient motivation for role playing. to some it is a threat, to others it is too childish.

A good warm-up of some kind is often helpful to get a group into the spirit of role playing. For groups that are not used to role playing or not sure of the values in it, it is best to slip into role playing naturally in the training experience. At a point where a person tells how he would handle a situation, just suggest that he show the group rather than tell them about it. To stop and say "Oh, let's do role playing" and make a production out of briefing the players, setting the scene and locating appropriate props is unnecessary and may create apprehension and negative responses. Preplanned skill training exercises are a good way to start a group using role playing or to introduce a group accustomed to role playing to some new uses of it.

Role playing is especially useful in helping personnel develop new skills. Very often a change that is being initiated in an organization requires the staff to use different skills. Trying to bring in a concept of democratic supervision, for example, requires the staff to work with one another in quite different ways. Role playing can often provide the permissive atmosphere in which there is freedom to try with no penalty for failure. This may help people who would not otherwise experiment with new skills to try them out. Within the make believe context of role playing they can gain a great deal of practice and some confidence in the use of a skill. In summary, role playing is useful in portraying any situation that could really happen. Its great scope and flexibility give it almost unlimited variety. Among the ordinary uses of role playing are the following:

1. To demonstrate a situation so all can see it.
2. To show and perhaps evaluate different ways of handling the same situation.
3. To share feelings and develop sensitivity to the feelings and viewpoints of others. This can be done by having different people act out their concept of the same role. Nurses can assume the role of patients or doctors to gain insight into their feelings in certain situations.
4. To learn new behavior patterns and strengthen them through practice.
5. To work out actual problems in human relations by sharing and understanding opposing roles.
6. To practice specific skills. To practice taking a role in which the person is unsure.

7. To evaluate procedures, role playing can be used before and after the learning experience to see how much improvement has taken place.

The Lab Method

Probably the most effective way of learning about group process, and developing more interpersonal sensitivity and self-awareness is through a laboratory method experience. The lab method focuses on learning through actual experiences. People learn about group dynamics and interpersonal relations by forming a group and studying the experiences they have together in that group. As the group starts working together, it has to work out its goals, solve problems, develop communication patterns, discover its leadership resources, and get to know the interests of each member. From time to time, the group reviews what has been happening and looks at leadership, communication, control, interaction, member roles and tries to understand the experience as it has been happening to them. In this process, members may also become more aware of the effect of their own behavior in the group, and become more in tune with themselves and others. The examination of group process and interpersonal relations is usually assisted by a skilled person with special training in the lab method.

One form of the lab method is the unstructured T-group type where there is no structure of agenda for the group. Looking at how the group handles the lack of structure and leadership is an important part of the experience.[1] Another form of the lab method is to use a series of exercises or preplanned experiences which have specific training goals. There are a number of sources of descriptions of useful exercises and they usually include notes to help the leader adapt them to different situations.[2]

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[1] Lakin, Martin. *Interpersonal Encounter.* New York: McGraw-Hill, 1972. Schein, E. and W. Bennis. *Personal and Organizational Change Through Group Methods.* New York: Wiley, 1965.

[2] Descriptions of these exercises are found in: Pfeiffer and Jones. *Handbook of Structured Exercises.* (3 vols) Iowa City: University Associate Press, 1971.
Malamud, Daniel. *Toward Self Understanding: Group Techniques in Self Confrontation.* Springfield, Ill.: Thomas, 1965.
Schutz, William. *Joy.* New York: Grove Press, 1968.
Miles, Matthew B. *Learning to Work in Groups.* New York: Teachers College, Columbia University, 1959.

An examination of group process and interpersonal relations can also accompany the other training methods described in this monograph. For example, following a two hour session studying and discussing a case incident, a half hour could be added to study the dynamics of the group as they studied and discussed the case. The number of people participating, the impact of reporting different opinions, and leader and member roles could be looked at. In a way, this is a form of evaluating the experience on a process and personal basis. My bias is that most training programs can incorporate the lab method in this way rather easily with a great deal of value.

The lab method can also be used effectively as a warm up for a more comprehensive staff training program. For example, a new camp staff might spend the first day or two of their week pre camp training in a T-group. The lab method is a frequent intervention in team training and organizational development. Also many training sessions could be started more profitably by using some of the relaxation, sensory awareness and tuning in, or gestalt methods pioneered in the lab related experiences. Nonverbal methods could also be demonstrated as a way of establishing contact, expressing feelings, and building relationships with positive results in many training programs.

Audio-Visual Methods

This section on audio-visual methods focuses on the use of motion-pictures and tape recordings in staff education. Much of what is said about movies applies equally well to slides and film strips except that for both of these some dialogue is usually needed to accompany them.

The blackboard and its use is familiar, I guess, to everyone who has gone to school in North America. In recent years flannel boards, newsprint, and overhead projectors have gained considerably in popularity and effectiveness. A blackboard is difficult to use with a large group as the audience can't see it and the speaker has to turn his back to the audience to use it. The larger classrooms in the new Sir George building do not have blackboards and the expectation is that if the professor has something to write, he will use an overhead projector where he can write the same as on a blackboard but on a screen while he remains facing the group and in a way that everyone can see it.

For smaller groups, such as we usually work with in staff education and training programs, I prefer to use newsprint. These are sheets of newspaper without the printing and are the usual two by three feet size. Sheets of newsprint are very inexpensive and can be written on with felt pens. With newsprint, material can be prepared in advance and then hung up at the appropriate time, and anything written during one session can be saved to use again.

Motion Pictures

There are at least four different ways of using motion pictures in staff training programs. They include:

1. Watching and discussing
2. Special watching groups reporting to the total group
3. Skit completion methods
4. Pre-showing sensitizing or shocking procedures to help people identify with the theme or the problem depicted

Watching and Discussing

The most straightforward way of using movies is to tell the audience the subject of the film, show it to them, and then discuss it afterwards. There are many ways of organizing the discussion following a film but this method chiefly consists of involving the people after the showing of the film. This is a widely used and successful method if a good discussion can be generated. It is important to use appropriate discussion techniques to keep the session lively and to have as many as possible participate. There are a variety of methods that can be used in conducting the discussion and it is suggested that different variations at this point might be considered by those who favor this method.

Special Watching Groups

Before a film starts the audience can be briefed to watch for specific things in the film either as individuals or in small groups. This tends to involve them more for as they are watching the film they are looking for specific things, which they will report on in the discussion following the film. They may be given a specific assignment such as watching group process. They become observers and watch such things as: who spoke to whom; how many times each person spoke; what roles were taken by the different people in the film; how were decisions made; and so forth. If the audience is large, they may be divided up into subgroups, with each group watching for different things or watching different people and then reporting back to the total group following the completion of the film. The specific things that the audience would watch for depends upon the film used and the educational objectives of the session. Several suggestions, however, are found in the examples given below.

A Film Guide

Another way of increasing the value of a film and the discussion following it is to prepare a film guide which the audience use during the film. This follows up on the idea above of the special watching groups but adds to the variety and depth of things that are watched for during the film. A carefully prepared guide focuses attention on preselected areas which may develop a theme or add continuity to the points the trainer wants to come out of the film.

The following is a brief excerpt from the beginning of a film guide for the movie "Feeling of Rejection" (National Film Board).

1. **Margaret is leaving her office**.

   This is the story of Margaret. Like everyone else she has personal problems. In this movie we are going to explore how she came to be the kind of person who would have such problems. There is a little bit of Margaret in all of us and what we learn about her may help us in our own understanding of ourselves.

2. **Margeret is looking at movie advertisement**.

   The next scene is a brief one but if you observe closely you'll see how much it reveals about Margaret's relationship with her family.

3. **Margaret's family walks in to supper.**

   Notice the grouping as they walk in to supper . . . watch Margaret now.

4. **Margaret agrees to do the ironing.**

   Why does she give in so easily?

Skit Completion Method

Many films tell a story in sequence and in these films you can watch the action develop. Such films can be stopped at certain strategic points and the audience can be asked what they think is going to happen. Or, the audience can be asked to describe what they would do in such a situation. This procedure pulls the audience in as participants and gets them thinking specifically about what is happening in the film and how it related to their specific situations. If they project themselves into the scene being described in the film and think through what they would do in the situation, it then provides them with an opportunity to check their behavior or problem solving procedure along side that shown in the film. It gives the audience some yardstick against which they can compare what they would have done. For example, in the public health film "Broken Appointment", the nurse is faced with some hostility from the client's husband and this encourages resistance from the client. At this point, the film can be stopped and the group asked how they would handle this situation – how they would try to uncover the basis for the husband's hostility and gain the client's cooperation in her health program. Following a

discussion of the suggested possible approaches, the rest of the film would be shown and all would see how this public health nurse worked things out (with a happy ending, of course).

An alternative to discussing possible approaches to a problem presented in a film is to act out the situation and have people demonstrate how they would handle it. In the example above people would take the part of the client, and her husband, and someone would be the nurse picking up where the nurse in the film left off. This is the role playing procedure again.

There are two particular values of the skit completion method. One is that the participants become very much involved in the actual film. The other is that each participant has an opportunity to suggest his behavior in a specific situation and then get some comparative material as to how likely his approach was to succeed or fail. A film provides these kinds of answers regarding the proposed behavior of the participants without putting the trainer into the role of giving the answers and saying what would or would not have worked in any given situation.

Pre-showing Sensitizing or Shocking Procedures

It may be helpful to warm up a group before a film showing and get him involved in the subject or problems portrayed in the film. This might be along the lines of the skit completion method where the group would be presented with a particular problem and asked to solve it. Following their solutions and a discussion of them they would be told that this film shows ways of handling this particular problem. Or, the subject in the film might be discussed through guiding questions from the trainer. A quick quiz asking for written responses to questions covered in the film could also serve as a warm up. It could be given again at the close of the film to compare answers and stimulate discussion.

Or, perhaps a more attention forcusing or shocking procedure might be used. For example, the film "Fears of Children" dramatizes what develops when a child's anger for his parents is not accepted as a natural part of the growing up process. Before the movie is shown to a group of nursery school teachers, three of the group are asked in turn to play the part of a mother asking her five year old son to stop watching television and come for dinner. The trainer, taking the part of the five year old, responds with anger and tells "mother" to "just drop dead and stop bothering me". The teacher playing the part of mother often react sharply to this as do some of the rest of the audience. All become more interested in how anger in young children should be handled. The film, as it deals with this real interest, is watched much more closely and has more meaning for the group.

Before a showing of the film "Shyness" (National Film Board), the audience might be asked to describe some of their experiences in situations where they felt insecure or left out, and to report any particular incidents they could remember

where people tried to bring them out of their shyness. Having recalled to mind their own particular feeling around shyness, this group would likely be a great deal more sensitive to the feelings of the girl depicted in the film and more aware of the consequences of the actions taken by the adults in her life to help her overcome these feelings of inadequacy.

In all four of these general methods the amount of action under discussion can be limited by stopping the film. In some cases, then, the film might be stopped every few minutes while in other cases only segments of films might be used to start a discussion or to make a point. Some method of presensitization or stopping the film for audience involvement is essential to prevent the trainees from just watching the film for enjoyment and neglecting to look at its applications.

Examples of Using Films

Let us now take a film such as "Meeting in Session" (Teachers College, Columbia Univ.) and look at a variety of ways in using this film for training and educational purposes. The film "Meeting in Session" is twenty minutes long and shows two meetings of a small group of nurses as they try to solve the problem of staffing their hospital on the four to twelve shift. In each meeting, the problem and the participants are the same. The differences are in the general approach, the attitudes displayed, the techniques used and the results achieved. In the first meeting the participants enact the negative roles characteristic of individuals intent on their own feelings and problems. In the second meeting the nurses assume the roles of cooperative group members, interested in desirable solutions and sympathetically aware of each others feelings. The meeting is not at all perfect but it demonstrates some very good techniques of group procedures. It is a good film to use in helping staff learn methods for problem solving and decision making.

Example A

Before showing the film, the audience might be divided into small groups, with each group responsible for analyzing and reporting on some aspect of the film presentation of the two meetings. Such as:

1. How the persons in the film attempted to define and solve their problem.
2. The interpersonal relationship shown and their effect on decision-making.
3. The use made of the ideas of members.
4. The roles played by the leader and other individuals.
5. Good techniques of group procedures depicted.

The participants might be given observation sheets on which to make specific recordings of the roles of group members, etc. Following showing of the full movie, the people responsible for these different areas would meet, collect their ideas and then report back to the whole group. Or, the film might be shown in two segments, and each half reported on and discussed in turn.

Example B

During the showing of the film the participants are asked to keep a record of the helping and hindering forces within the group. The first rather poor meeting is shown, the film stopped and the helping and hindering forces in it are discussed. A summary can be made, then, of the typical kinds of factors which are likely to help and hinder the groups in which we work. Or, following the showing of the first rather poor meeting, the trainees might be asked how they would improve the meeting. They would divide into groups of threes or fours to work on their suggestions. They could be further asked to assume the roles of the characters in the film and role play a meeting which would incorporate their suggestions. Either method is an example of the skit completion method as the participants would have described how they felt a similar meeting should be conducted. The "good" meeting is then shown to give comparable data to the participants on how a better meeting is conducted. In some cases the participants will have had good ideas which were not shown in the second scene but it will likely show some procedures which they did not think about.

Example C

A training group is warmed up to the film "Meeting In Session" by selecting several members of the group, giving them a problem and asking them to spend several minutes in front of the group attempting to solve this problem. The rest of the group are assigned tasks as observers to collect information on the helping and hindering aspects of the group's procedures or they can be assigned more specific things to watch for in the areas of climate, involvement, interaction, cohesion, task roles, and productivity.

Following a brief demonstration the observers report on what they saw and whether they felt it was helpful or hindering to the process of the group. The trainer then points out to the group that the following film "Meeting In Session" shows a group in two different scenes working on a specific problem. He suggests that the group collect the same kind of information to enable them to compare their effectiveness in problem solving to the ineffective methods used in the first half of the film and the good efforts made in the second half.

The most involving of all of these examples are those where the participants are asked to role play a second scene pretending they are the characters shown in the first scene of the film. In such a case all the trainees identify very closely with the participants in the film. During the showing of the second "good" part, they are very watchful of the behavior of the members and the procedure used by the group to work effectively on the problem. If the training group is larger than the six needed as the participants in the film, the group can be divided by multiples of six and each group can simultaneously put on a second meeting through role playing. If the participants are attempting to gain skills in the observation of the roles and behavior of group members, the methods requiring them to utilize these

observational techniques in watching the film are very helpful. If this is the goal of the training experience, one meeting alone might be used and shown through a first time, while the members collected their observational data. A second showing of the same part can take the film bit by bit to allow the members to check their observational record and see where it was correct and where they had made errors.

Tape and Video Tape Recordings

There are three somewhat different types of material that can be used by way of tape recordings. Real or simulated case studies or case problems can be presented by way of a tape. A real case would be an excerpt from a group's meeting, a supervisory session, or an interview with a parent or prospective employee, or it might be a recording of a worker handling a difficult situation with a group or individual. A simulated case study is prepared by writing up a script from the case material and then having people enact the different roles required. These case study tapes can be especially useful for training purposes if they require a participant to work out his own reaction to the case situation. For example, to help participants practice the observation and recording of the roles of individual group members, a simulated tape can be made up to include a variety of roles of group members. A fifteen second pause between each member's contribution allows the participants who are observing time to check off on their observation sheets the role it is felt the person is taking at that time. Each item on the tape is numbered to enable a comparison to be made following the playing of the tape. Or, the tape can be played again and the correct answers given to enable each participant to compare his answer.

If the training group is working on procedures in interviewing or supervising, a sound or video tape of a supervisory situation can be played for the group to analyze. Or better yet, a tape can be made with a pause after each statement by the supervisee to facilitate the tape being stopped in order that the participants can try their hand at being the supervisor and responding to the questions or comments of the supervisee. This is a useful teaching technique in developing skills in interviewing or supervising. Again the tape is stopped after each comment by the client and the trainees try to respond as a supervisor would. They may write down their response, then compare their interventions, discussing the various approaches they used. As the tape continues, they hear the response of the real supervisor and hence have something to help evaluate how well they are doing.

The second general use of tape recordings is where an actual meeting or decision-making session of the training group is recorded to be studied at a later time. This use of recordings cannot be duplicated by any other method. Recordings made in this way are open to the same variety of techniques that have been discussed above under the heading of Motion Pictures. For example, the meeting can be played back to the training group with an opportunity to stop it whenever a member wishes to comment on what has been happening. Members can analyze

their own roles, the roles of others in the group, or study the group's procedures and see "what leads to what". This method is very helpful in gaining insight into one's actual role in a group situation. Or, a recording may be played or shown while the trainees use an observation sheet, respond to a member role check list, fill out a rating form, or write down estimates of what they thought was actually happening in the taped situation. These observations and records can be discussed and compared with the tape recording to check on their accuracy. To help highlight non-verbal communication the video tape can be shown with the sound off and analyzed. Later, it can be shown with both sound and picture to check on how much the sound adds.

Many people have never had an opportunity to really look at how they appear in a group situation. Some are very surprised to find how much they talk, or how emotionally they react to some of the ideas of other members. Staff may want to record a planning session, or group activity and then watch it later on to see exactly how they handled it. Or, it may be a supervisory session which can then be studied and reflected on later.

The last general use of recording is to preserve lectures, panels, or group discussions which have especially valuable content and have them available to be replayed at a later time. Lectures, descriptions and talks can be put on tape and played to many different training groups in any situation whether or not the resource person is available. Or, if the resource person who made the tape is present, it leaves him free to write on the blackboard. Very often a talk can be put more concisely on a tape recording and playing the tape recording then saves time over an unrehearsed lecture.

PART III
EVALUATING STAFF TRAINING PROGRAMS

The most important purpose of appraising a staff education program is to help improve future programs. Often, an evaluation is conducted following a program to tell the organizers "how well they did". While this is interesting, it is not very helpful and is not worth taking much time to do. Useful evaluation is best seen as an integral part of the planning process. An assessment is made of what interests and concerns the staff want to build training programs around, the programs are planned and conducted, and another assessment is made to see how much progress was made and what the priority interests now are for future training.

Staff training programs can be like a merry-go-round. There can be excitement, fun and interest, but the participants get off right where they got on. There have been activities but everyone ended up where they started. To prevent programs from becoming merry-go-rounds there need to be clearly stated, functional goals and continuous assessment of movement toward these goals.

The focus of this section is to suggest ways of making evaluations more accurate and more useful in planning staff training programs. It is a simple task for the trainer to sit in his office and plan a program based on his assessment of the situation (and this is exactly what I did with the first inservice program I planned). But this is not good enough in identifying the most important training areas nor does it involve the trainees in the important process of assessing their training needs.

What Can Be Evaluated?

There are three major areas that can be measured in an attempt to assess the impact of a training program:

1. Changes in participants on-the-job effectiveness.
2. Changes in knowledge, attitudes and skills of participants.
3. Responses of participants to what they think they have learned.

Areas which are not as closely related to the effectiveness of training programs but which may add some information include attendance at training programs, readiness of staff to use their own time and money for training, and more indirectly, staff morale, turnover, and absenteeism. Unfortunately all of these areas are affected by a large number of factors in addition to staff training.

The most valid way to evaluate a training program is to assess the improvement in job performance of those who participated in the program and perhaps compare it with those who did not participate. It is very difficult to assess job performance but a standard questionnaire or job assessment sheet can be used by those people

making the assessment. As one person's view is often biased, it is best to have three or four people assess each participant. The people can be colleagues and do not need to be supervisors.

The knowledge, attitudes and skills of the participants can also be measured before and after a training program to see if they improve. Increased knowledge, or improved attitudes and skills usually suggests more effective job performance, but we all know of people who can read a new technical book or take a professional development course and not do anything differently on the job.

The response of participants about what they think they have learned in a program is a valuable source of information and a guide to replanning. Such responses, however, are not indicative of changes in job performance. People who are happiest with a training program may be those who didn't really get involved personally. While their level of satisfaction may decide the focus of the next training program, it is not necessarily related to what they are trying out on the job (in fact those really trying out new skills may be struggling to work things out and hence be somewhat frustrated with the training).

The Evaluation Process

Evaluation, like any other part of a training program requires planning if it is to provide accurate and useful information. For this purpose, the trainer and the planning committee should try to describe some of the desired outcomes of the training program, set up a procedure for collecting information about any such changes, and be prepared to analyze the data and suggest implications for the training activities. Some tools to help gather the information may need to be prepared or selected from among those available. The plan for evaluation should be prepared at the same time as the rest of the training program and doing so will help to sharpen up the specificity of the goals identified and selected for the program.

Methods of Evaluation

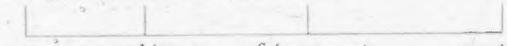
The three most common methods of evaluating change brought about by a training program are to *observe* the trainee, get him to *report* on the experience, or *test* his possible learnings.

Observation

Watching and recording the actual performance of training group members following a training program is the most direct method of measuring change. Best results are obtained by standardized, systematic observations by more than two people. To standardize observations some sort of guide questions or check list is helpful. Such a guide may ask the observer to describe the person's actions related to the training goal, such as communication with staff. The raters for each trainee are asked the same three or four questions such as:

Sample A – Observation Report Form

1. To what extent has this person's effectiveness in staff meetings changed since the training program



none a bit a fair amount a great deal

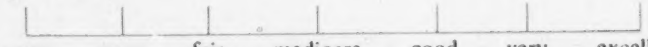
2. Describe briefly some of the things which he is now doing differently.
3. What changes have you noticed in the way other people have reacted to him during this time?
4. What changes have occurred in your relationship to him during this time?

Reporting

Two types of reports are helpful from participants in training programs: their immediate reactions to the content and methods of the program, and their experience over a period of time in making use of possible learnings. Below is a sample of a reaction sheet that would be given to participants immediately following a training program. Signing names is optional although if it is a mixed staff group it might give additional perspective if job area were mentioned.

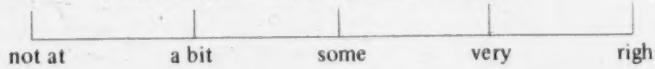
Sample B – Post Meeting Report Form

1. On the whole, how helpful did you feel this training program was? (circle one).



very poor poor fair mediocre good very good excellent

2. To what extent did it deal with your real interests?



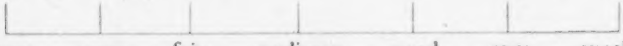
not at all a bit some very much right on

3. What were the major strengths of the program?
4. What were the major weaknesses?
5. What part, if any, of this program do you see yourself using in your work?
6. What suggestions do you have for what should be done at the next training program?

A month to six months after a training program, a follow-up questionnaire can be sent to the participants to see how they feel about the training program (the rosy glow may have worn off) and what things they have been trying to do that they think were related to the training.

Sample C – One Month After Report Form

1. Looking back on the training program now, how helpful do you feel it was? (circle one)



very poor | poor | fair | mediocre | good | very good | excellent

2. What weaknesses or strengths of the program still stand out in your mind? (describe briefly)
3. In your work here, are there any things which you are doing differently that you feel are related to the training program? (describe briefly)
4. Have you noticed any changes in you, your attitudes or relationships that you feel were related to the training program? (describe briefly)
5. What problems or drawbacks have you encountered in trying out ideas from the training program?
6. Describe the kind of training that you feel would be most helpful to you now.

Usually a report will include more thoughtful information if it is discussed with other people first. A small group discussion for ten or fifteen minutes after a training program with each group working on the questions in Sample B's form is a way of doing this. Each group should have a recorder and he can either make a report for the group showing the range of opinions, report a summary to the total training group, or both. To get thinking going as a sort of pump primer, small groups can be convened for five or six minutes followed by each person completing their own form. A better way, although it takes more time, is to have several people who would undertake to interview the participants or a good size sample of them if it was a large group. The interviewers do not need to have been participants but they do need to ask similar questions. Sample B report form could also be used as this interview guide. All three of these discussion methods are workable in the one to six month follow-up. The small group approach to preparing a report is especially useful if the staff are involved in planning the training. Their assessment of the previous program can lead to an identification of new training goals and a selection of priorities among them.

Skill Ratings and Attitude Surveys

Training objectives that have specific, measurable objectives may be evaluated by rating the participants' performance in these areas. For example, a camp program may hope counselors will learn a variety of rainy day activities, how to set up a tent, and procedures for writing campers' parents. These tasks could include specific standards and counselors could be rated on their performance to determine the success of the training program.

In many organizations leaders keep records of their group work. These records can serve as a source of evaluation data by looking over several months that include a month before the training program, and perhaps three months after the program to see if they reflect any changes related to the objectives of the training.

Several years ago, I developed a Leadership Inventory[1] which is closely related to actual success as a group leader. This pencil and paper instrument has been used by many groups before and after training programs to assess the impact of the training. There are other standardized questionnaires that are available on the market related to many typical training areas (leadership style, communication, supervision, etc.) that can be used on a before and after basis in a similar way.[2]

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[1] The Dimock Leadership Inventory (1970). Available from the Bookstore, Sir George Williams University, Montreal 107, Quebec.

[2] For more information on evaluation techniques and designs see: Dimock, H.G. *How to Analyze and Evaluate Group Growth.* Montreal: Sir George Williams University, 1972.